300.11

New Employee Training Checklist

Overview

Introduction   New employees hired by local WIC agencies must learn many tasks before they can work independently. This policy provides a standard training checklist for all new employees to facilitate consistent training. The checklist identifies core tasks. However, it is not intended to use in documenting the cross-training between positions that happens over time.

Policy   The WIC Coordinator should periodically review the checklist with the on-the-job training coach and new employee until it is completed. The checklist should be completed within a reasonable period of time.

Format   The checklist includes a column titled Discussed/Observed for each task. When a task has been discussed or observed, the trainer should initial the appropriate column. Policy references are included throughout the checklist.

Note: Many tasks are already marked as discussed during the New Employee Training Course. **However, further discussion is needed about these tasks and should be documented in the column next to the NETC initials.**

Completing it   The table below provides general guidelines for completing the checklist.

Step	Action
1	Complete the first page.
2	Prioritize the training tasks to address first based on clinic schedules, primary task assignments, and other factors.
3	Initial each task as it is discussed and observed.
4	Write N/A (for not applicable) in the columns for any tasks that the new employee will not be assigned.
5	File the checklist along with the employee's Training and Education Record.

New Employee Training Checklist

Name:
Position:
Start date:
NETC date:
OJT coach:

Signature key   The list of initials and corresponding signatures for this checklist appear below.

Initials	Signature
NETC	WIC New Employee Training Course
PILMS	Prepare Iowa Learning Management System

Overview   Tasks to be completed before attending the WIC New Employee Training Course. See Policy 300.10 for more information.

Step	Activity	Date Completed
1	WIC Coordinator requests a data system security token from state WIC office (330.10)	
2	Complete local agency orientation (300.10)	
3	Complete the data system training including homework (300.12)	
4	Register for New Employee Training Course (NETC) (300.10)	
5	Complete New Employee Training Homework Checklist prior to attending NETC	
6	Attend NETC	
7	Record training and continuing education on training and education record (300.10a)	
8	Observe one family unit during a certification appt.	
9	Observe and work alongside a co-worker for one clinic	

Communication

	Discussed	Observed
Policy and Procedure Manuals		
Protocol when calling the state WIC office (L/A policy) • WIC HelpDesk • (800) 532-1579 • WICHD@idph.iowa.gov		
Friday Facts weekly newsletter (420.05 and samples)		

Clinic Set-Up

Clinic setting

	Discussed	Observed
Confidentiality • Clinic set-up (380.60) • Position of computer screens (380.60) • Conversations and phone calls • Participant information • Security access	NETC	
Nondiscrimination policy, statement and poster (320.70)	NETC	
And Justice for All poster (320.40)	NETC	
Clinic ID signs on outside door		
No smoking sign (300.20)		
Clinic flow (L/A policy)		
Promotes and supports breastfeeding (380.60)	NETC	
Customer service expectations (L/A policy and orientation)		

Data system overview

	Discussed	Observed
Set up computers & printer/scanner		
Set up eWIC card readers and signature pads		
Set up work area for clinic, etc. (L/A policy)		
Security access for: Scheduler only, Support staff , Health professional non-CPA, CPA, IWIN Coordinator, Support Staff Admin, CPA Admin, and Breastfeeding Peer Counselor		
Tokens and passwords		
Log into data system training environment		
Navigating the data system and File menu		
Physical security of computers, printer/scanner, and food instruments		
Computer and printer/scanner care and maintenance		
E-signature		
Synchronization		
Network Down Time (NDT) Mode (should rarely be used – benefits can't be issued when in NDT mode and once in NDT mode, clinics must stay in NDT mode)		
WIC Helpdesk		

Data system fundamentals

	Discussed	Observed
Simple search vs. Advance search with wildcard (%)		
Navigation features (e.g., tabs, radio buttons, check boxes, drop down lists, record selector, calendar dates, new vs. edit, copy, cut, paste, etc.)		
Alerts and comments		
Required fields		
Best practices and non-required fields		
Family ID and participant ID		
Record dates		

Clinic Services

Appointments

	Discussed	Observed
Information to give those making appointments (215.20) • What participants need to bring with them • Appointment notices • Special arrangements needed	NETC	
10/20 day scheduling requirement (215.20)	NETC	
Length of certification periods (when to recertify) (215.06)	NETC	
Follow-up on pregnant women who miss their WIC appointment (215.23)		
Late arrivals and walk-ins (L/A policy)		
Clinic closings policy (L/A policy)		
Scheduling return appointments (215.20)		

Scheduler

	Discussed	Observed
Select clinic		
New appointment (215.20, 215.75, 240.30) • Certification • Nutrition education • Nutrition class • Health update • Non-WIC appointment		
Schedule, reschedule, cancel, move appointments		
Refresh appointments		
Recent family		
Income guidelines		
Print an appointment notice		
Copy appointments		
Marking status of appointments		

Clinic Services, Continued

Family

	Discussed	Observed
New family members		
Participant, parent/guardian, proxy		
Dual enrollment		
<mark>Processing Standards</mark>		
Mailing and physical address		
VOC (transfer family to and from other clinics)		
Add a foster child		
FI issuance		
Precertification of Priority II infants and Pregnant Women		
Contact/Address		
Transfer family		
Retrieve participant		
Organization of names • Primary parent/guardian • Secondary parent/guardian • Active participant • Non-active participant • Proxies		
<mark>New Member/Proxy hyperlink</mark>		
Enrollment information/dual enrollment		
New participant type pop-up/Participant type history		
Alias hyperlink		
Notations on screen: FM, Foster, L, HR, Pre, VOC, Prov		
Referred to WIC by		
Mother's education level		
FI Issuance		
Output language		

Eligibility

	Discussed	Observed
Participant type and certification periods (215.06) • Serving applicants who live in another service area • Address (not legal status)		
Income guidelines		
Adjunctive eligibility	NETC	
Voter registration (245.90)		

Clinic Services, Continued

Identity (220.10)

	Discussed	Observed
Proof of identity • Acceptable forms of identity • Exceptions to policy	NETC	
Physically seen at certification (215.15)		

Income (215.40)

	Discussed	Observed
Household or family size • Definition of a household • Pregnant women counted as two • Definition of homeless status (390.30) • Reported changes in household members	NETC	
Adjunctive eligibility • What it is and why • Acceptable forms of proof • Follow-up requirements • Reported changes in program participation	NETC	
Proof of income • What is counted and what is not • Acceptable forms of proof • Exceptions to policy • Current income guidelines (215.39) • Reported changes of income • Income family and foster children • Follow-up requirements	NETC	
Print notice of ineligibility (215.08)		

Address (215.50)

	Discussed	Observed
Acceptable forms of proof	NETC	
Exceptions to policy	NETC	
Definition of homeless (390.30)	NETC	
Definition of migrant status (390.10)	NETC	
Definition of refugee status (390.20)	NETC	
Follow-up requirements	NETC	

Clinic Services, Continued

Other issues

	Discussed	Observed
Voter Registration (245.90) • Who to give form to • Filing forms/retention requirements		
Participant violations overview (225.80)	NETC	
Participant transfers (VOC) (220.20) • Responding to requests for participant information when a participant moves to another state • Incoming out-of-state transfers • Incoming in-state transfers • Providing VOC information to participants planning to move	NETC	
Physical presence requirement (215.15)	NETC	
Polk County Commodity Supplemental Food Program (Polk, Dallas, Jasper, Warren, Madison, and Boone counties) (430.40)		
Print signed Statement for Identity, Address and Income		

Health and Nutrition Assessment

Health and nutrition

	Discussed	Observed
Pregnancy and postpartum data • Autofill EDD or LMP • Link to infant		
Breastfeeding • Feeding history of the infant • Link to mother • Issue breast pump		
Blood • Referral data • Trend graph • Deferred results • Normal results • Lead level measurement		
Anthro • Referral data • Birth measurements for children less than 2 years of age • Chart list (print a growth chart) • Growth charts age-adjusted for prematurity • Flexible weight controls • Weeks gestation • Inaccurate reasons		
Nutrition Interview • Participant centered • Use of the starters/prompts • Print a Nutrition Interview • Print Request for Information • Print Request for Referral		
Risk • Auto-assigned nutrition risks • Manually assign nutrition risks • Manually assigning someone as high risk		

Health and Nutrition Assessment, Continued

Health and nutrition (continued)

	Discussed	Observed
Nutrition Education • Completed nutrition education • Planned nutrition education • Copy completed nutrition education topics for family members • WICHealth.org		
Care Plan • High risk participants require complete SOAP note • Print a care plan		

Measurements (215.71)

	Discussed	Observed
Using referral data for height and weight	NETC	
Weight measurements	NETC	
Recumbent length measurements	NETC	
Standing height measurements	NETC	
Growth charts	NETC	
Explain pediatric growth charts	NETC	
Explain a pregnancy weight gain chart	NETC	
Health and nutrition history cards	NETC	

Blood tests (215.72)

	Discussed	Observed
Puncture resistant container for lancets (360.65)	PILMS	
Gloves (360.65)	PILMS	
Regular hand washing (360.65)	PILMS	
Use of non-invasive pulse co-oximeter (Policy 215.72)	NETC	
Blood drawing technique for hemoglobin	PILMS	
HemoCue control sample and log	PILMS	
Close cuvette container after each use	PILMS	
Explain results of blood test	PILMS	
Blood testing schedule	PILMS	
Documenting on Hemoglobin log sheet	PILMS	
Using referral data	PILMS	
History of lead screening for all participant categories • Referrals for infants and children screened		

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Health and Nutrition Assessment, Continued

Nutrition assessment (215.80)

	Discussed	Observed
Infant nutrition interview	NETC	
Child's nutrition interview	NETC	
Women's nutrition interview	NETC	
Dietary nutrition risks (215.61) • Medical nutrition risks • Dietary risks • Auto-assigned vs. manual • High risk conditions	NETC	
Care plans for high-risk participants (215.83, 240.50))	NETC	

Other issues

	Discussed	Observed
Nutrition health history cards (215.63)		
Care plans for high-risk participants (215.83)	NETC	
Water testing for bacteria and nitrates (245.80)		
Fluoride status of household water supply (240.90)		
Time studies for nutrition education reporting (315.43)		
Immunization status of infants and children (245.30)		
Substance use and abuse (245.65) • Written information to all pregnant women • List of available treatment centers and programs		

Final Eligibility Determination/Certification

	Discussed	Observed
Certification end date		
Categorical eligibility end date		
Troubleshooting unsuccessful certification		
Violations		
Termination		
Reinstate		
Applicant Rights and Responsibilities (215.95) and use of the Signature Pad	NETC	
Print Notice of Termination (215.30)	NETC	
Print Notice of Violation		
Print Notice of Ineligibility (215.08)		
Role and signature of Competent Professional Authority (CPA) (310.08)	NETC	

Referrals

Process

	Discussed	Observed
Referral from the WIC Program form (245.20)	NETC	
Request for Information form		
Referral agencies (L/A)		
Follow-up on referrals (L/A)		
<mark>Participant/Family Referrals</mark>		
Sharing of WIC data <mark>(245.05)</mark>		

Examples

	Discussed	Observed
Health Services Application (245.16)	NETC	
hawk-i Application (245.10)	NETC	
Medicaid guidelines (in the *hawk-i* application) (245.10)	NETC	
Maternal Health (245.15)	NETC	
Child Health (245.15)	NETC	
Family Planning (245.25)	NETC	
Public health nursing (245.50)	NETC	
Early ACCESS	NETC	
Immunizations (245.30)	NETC	
Blood lead levels (245.70)	NETC	
EFNEP and FNP		
Head Start and Early Head Start		
Oral health (240.90)		
Tobacco cessation		
Other community resources (L/A policy)		

Participant Education

Nutrition

	Discussed	Observed
Initial contacts at certification (240.50)		
High-risk second contacts (240.55)		
Low-risk second contacts (240.55)		
Exit contacts for postpartum women (240.55)		
Scheduling second ed contacts (240.50)		
Documenting second ed contacts (240.60)		
Print materials (nutrition education, breastfeeding, outreach, and program forms) and how to order (340.15)		

Breastfeeding

	Discussed	Observed
Breastfeeding Promotion & Support Guidelines for Healthy Full Term Infants		
Issuing breast pumps and other equipment (240.85)		
Breastfeeding teaching resources	NETC	

WIC Foods

Food instruments

	Discussed	Observed
Food Package • Model food packages • Categories/Subcategories • Add/remove food • Tailor food packages Special formula documentation		
Issuing a PAN and eWIC card		
Participant PIN selection		
Deactivating eWIC cards		
Issuing benefits to the eWIC card		
Capturing a signature using the Signature Pad		
Calendar Month		
Proration of Food Benefits		
Proxy policy (225.70) • Form or required information • Documenting in data system	NETC	
Reissuing benefits as a result of a food package change		
Audit Trail		
Mailing food instruments (225.85)		
Missed FI pick-up policy (L/A policy)		
Lost/stolen food instruments (225.65)		
Supply and security of WIC FIs		

Food packages (235.10)

	Discussed	Observed
Approved foods for each participant category	NETC	
Maximum amount of formula	NETC	
Substitutions in food items	NETC	
Coupons with WIC benefits (*Welcome to WIC* video/DVD and flip chart*;*	NETC	
Special offers: extra ounces; buy 1, get 1 free (*Welcome to WIC* video and flip chart*;*	NETC	

Formulas

	Discussed	Observed
Current contract infant formulas (235.35)	NETC	
Exceptions for non-contract infant formulas (235.55)	NETC	
Approved special formulas (235.55)	NETC	
Locating a special purpose vendor	NETC	
Documentation for Medicaid regarding special formulas (235.30)	NETC	
Returned formula (235.65) • Issuing and Inventory control		

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WIC Foods, Continued

Other issues

	Discussed	Observed
Describe how to use eWIC card *(Participant brochure)*		
Approved vendors in the service area (L/A list)		
Physical security of FIs (330.10)		
Ordering eWIC cards (330.20)		
Farmers' Market Nutrition Program		

Miscellaneous

Daily file

	Discussed	Observed
Proxy cards	NETC	
Use of the Participant Customer Service IVR or web portal		

Reminder: Return completed checklist to your WIC Coordinator for filing.